

A Model for Engaging Customers

Stage	What you should do	Checklist
Open	<p>Say hello, introduce yourself, and find out to whom you are speaking.</p> <p>If the customer has been waiting a while, thank him or her for being patient.</p>	<ul style="list-style-type: none">• Were you courteous (8 C's)?• Is your body language open and engaging (body language)?• Is your work area neat and pleasant (8 C's)?
Explore	<p>Determine the reason for the visit or call. Ask as many questions as necessary to reach understanding while clarifying your perceptions of their needs.</p> <p>Use empathy, if needed, to respond to their feelings as well as to the content of their message.</p>	<ul style="list-style-type: none">• Did you give the customer your full attention and use the customer's name (8 C's)?• Did you encourage the customer to state his or her need (empathetic listening)?• Did you confirm your understanding of the problem (empathetic listening)?
Solve	<p>Once you have determined why the customer is here and have confirmed your understanding, it is time to present a solution or idea that meets the need. It might simply be a response to a question, or it might require a more detailed approach.</p>	<ul style="list-style-type: none">• Did you solve the problem or offer options for the customer?• Did you use plain English terms to explain proper procedures to the customer (no jargon)?• If necessary, did you make it clear to the customer what you can and cannot do (acting assertive, saying no)?• Were your answers concise and accurate (8 C's)?• For the customer going through a particularly difficult and emotional event, did you validate his or her feelings (empathetic listening)?
Close	<p>Summarize what you have done if it was complex task or answer. Ask if there is anything else you can do.</p>	<ul style="list-style-type: none">• Did you complete the transaction or documentation (8 C's)?• Did you summarize the discussion for the customer (empathetic listening)?• Did you address all relevant issues, particularly ones the customer may not have been aware of (8 C's complete)?